



**Docufide Sender:
Student Rosters**

Student Rosters

Using the Student Roster interface, you can import full student roster of current students (grades 9-12); you also will have the opportunity to import alumni records. When you import your student roster, you receive many benefits to manage your students' interaction with Parchment. For example, you will be able to run reports to discover which students have registered, and which students you need to contact to complete their registration.

Once you import the roster, Parchment will generate a unique Parchment Registration Code (also known as a PIN) for each current student in the roster. At the time the school uploads the roster, Parchment will mail, on behalf of the school, the registration code to the parents of each student at the address listed in the roster for that student. The registration letter contains instructions to students to create their account at parchment.com and how to use the Parchment Registration Code to associate their high school with their Parchment account.

This guide will describe the student roster feature including steps to:

- Prepare an import file.
- Import a student roster.
- Manage student registrations.
- Generate a mail merge file or PDF lists of Parchment Registration Codes.

Prepare Import File

Import files can be prepared by exporting data from your school's Student Information System (SIS) or by typing the information in a database or spreadsheet program.

Exporting SIS File

If you are exporting your text file from your SIS, you must complete the following steps:

1. Select the records you want to export (for example the all current students in grades 9-12).
2. Select the fields to include in your export file. The export file must contain the following fields:
 - a. Student ID - a unique Student ID for each student across all grades; the Student ID will be used to match an existing record in the Student Roster when importing an updated file.
 - b. Student Name (First and Last)
 - c. Date of Birth
 - d. Graduation or Leave Year
 - e. Address (full physical address)
3. Save the file to your hard drive in a CSV (comma separated) or tab-delineated text format.

Please Note: Parchment cannot provide specific steps for exporting a file from your SIS, but can assist with general questions.

Creating an Import File

If you are creating your text file in a database or spreadsheet program, you must complete the following steps:

1. Place each field in a separate column and each record in a separate row.

2. The file must contain the following fields:
 - a. Student ID - a unique Student ID for each student across all grades; the Student ID will be used to match an existing record in the Student Roster when importing an updated file.
 - b. Student Name (First and Last)
 - c. Date of Birth
 - d. Graduation or Leave Year
 - e. Address (full physical address)
3. Save the field to your hard drive in a CSV (comma separated) or tab-delineated text format.

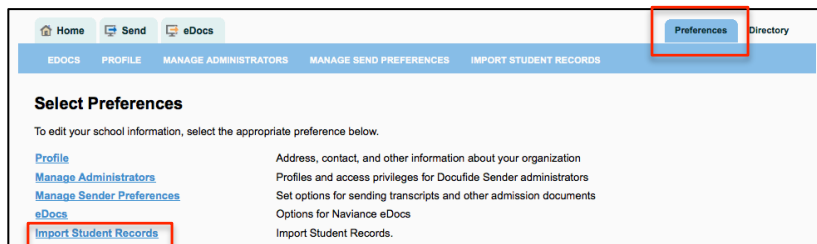
Below is a table of all fields that can be included in the file.

Field	Required	Description
Student First Name	Yes	Student's first name.
Student Middle Name	No	Student's middle name.
Student Last Name	Yes	Student's last name.
Suffix	No	Student's suffix (such as Jr, II, III, etc)
Date of Birth	Yes	Student's date of birth.
Graduation/Leave Year	Yes	Four-digit year of graduation.
Gender	No	Student's gender specified as Male or Female.
Current Grade Level	No	The student's current grade level such as 9 th , 10 th , 11 th , 12 th , Graduated, Left without Graduating.
Address1	Yes	First line of the student's address.
Address2	No	Second line of the student's address.
City	Yes	City of the student's address.
State	Yes	State or province of the student's address.
Postal Code	Yes	Postal code of the student's address.
Phone Number	No	Student's phone number.
Email Address	No	Student's email address.
Parent/Guardian First Name	No	Parent or guardian's first name.
Parent/Guardian Last Name	No	Parent or guardian's last name.
Parent/Guardian Address1	No	First line of the parent or guardian's address.
Parent/Guardian Address2	No	Second line of the parent or guardian's address.
Parent/Guardian City	No	City of the parent or guardian's address.
Parent/Guardian State	No	State or province of the parent or guardian's address.
Parent/Guardian Postal Code	No	Postal code of the parent or guardian's address.

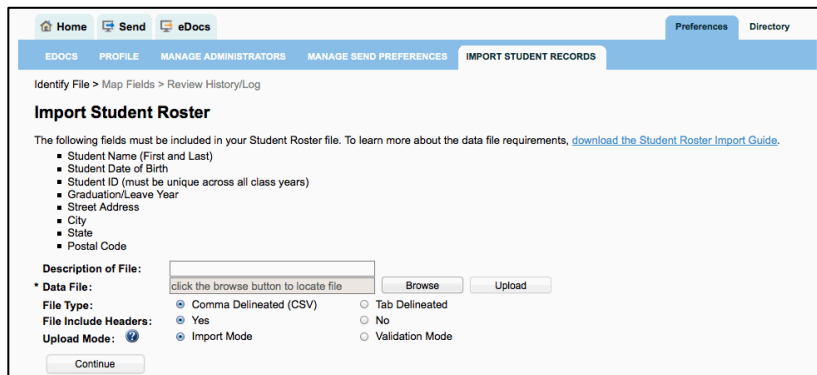
Import Student Roster

Once you have generated your import file, you can use the simple Docufide interface to test and import your student roster file.

Validate Import File



The screenshot shows the Docufide interface with the 'Preferences' link highlighted in the top navigation bar. Below the navigation bar, the 'Select Preferences' section is visible. It lists several preference categories: Profile, Manage Administrators, Manage Sender Preferences, eDocs, and Import Student Records. The 'Import Student Records' link is highlighted with a red box.



The screenshot shows the Docufide interface with the 'Import Student Records' link highlighted in the top navigation bar. Below the navigation bar, the 'Import Student Roster' section is visible. It lists the fields that must be included in the Student Roster file: Student Name (First and Last), Student Date of Birth, Student ID (must be unique across all class years), Graduation/Leave Year, Street Address, City, State, and Postal Code. Below the list, there is a 'Description of File' section with a text input field and a 'Browse' button. The 'File Type' section has radio buttons for 'Comma Delineated (CSV)' and 'Tab Delineated'. The 'File Include Headers' section has radio buttons for 'Yes' and 'No'. The 'Upload Mode' section has radio buttons for 'Import Mode' and 'Validation Mode'. A 'Continue' button is at the bottom.

Step 1: Access Import Student Roster Page

Select the 'Preferences' link header bar and then the 'Import Roster Records' link.

Note: An administrator must have Site Admin permission for the Docufide Sender module to access the Import Roster Records page.

Step 2: Upload the Import File

Upload the import file. You can provide an optional description for the file to make it easier to identify the import on the History/Log page.

Other settings to note include:

- File Type – indicate whether the file is a CSV or Tab Delineated file.
- File Include Headers – indicate whether the first row of the file contains column headings or actual data that should be imported.
- Upload Mode – select 'Validation Mode' to verify the file without importing any records.

Home Send eDocs Preferences Directory

EDOCS PROFILE MANAGE ADMINISTRATORS MANAGE SEND PREFERENCES IMPORT STUDENT RECORDS

Identify File > Map Fields > Review History/Log

Import Student Roster

Map the fields in your data file to the available field to import.

☒ Save Mapping

Column	Your Data	Available Roster Fields
1	First Name	Student First Name (required)
2	Last Name	Student Last Name (required)
3	DOB	Date of Birth (required)
4	Student ID	Student ID (required)
5	Grad year	Graduation/Leave Year (required)
6	Gender	Gender
7	Address	Address1 (required)
8	City	City (required)
9	State	State (required)
10	Postal Code	Postal Code (required)

Continue

Home Send eDocs Preferences Directory

EDOCS PROFILE MANAGE ADMINISTRATORS MANAGE SEND PREFERENCES IMPORT STUDENT RECORDS

Identify File > Map Fields > Review History/Log

Import Student Roster

Validation Report

Start Date/Time: 10/16/2011 14:50:05 PDT
End Date/Time: 10/16/2011 14:50:07 PDT
Number Valid Records: 2
Number Invalid Records: 3

Error Log

Row #	Validation Error
3	Missing Student ID
3	Missing Graduation/Leave Year
3	Invalid Gender
4	Invalid Gender
4	Missing Address1
4	Missing City
4	Missing State
4	Invalid Postal Code
6	Invalid Gender

[Export to Excel](#)

Import File

Step 3: Map Fields

Map the fields in your file to the fields in the Docufide database. Docufide will attempt to automatically map the fields, but you can correct the mapping as needed.

If you select the 'Save Mapping' checkbox, the next time you import a file the system will 'remember' the field mapping.

Step 4: Review Validation Report

Review the Validation Report to identify any errors in your file. The validation report will identify the row number and error so that you can correct the errors and re-import the file.

You can export the validation report to an Excel spreadsheet to assist with error resolution.

If there are errors in your file, correct the effected files and repeat steps 1-4 until you have no errors.

If your file is error free, click the Import File button and your validated file will be imported.

Home Send eDocs Preferences Directory

EDOCS PROFILE MANAGE ADMINISTRATORS MANAGE SEND PREFERENCES IMPORT STUDENT RECORDS

Identify File > Map Fields > Review History/Log

Import Student Roster

Import History/Log

Date	Admin	Data File	Description	Import Mode	Log	Records	
10/16/2011	Diegnan Rosemarie	view file	2011/2012 Grades 9-12	Import	view log	5	undo
10/16/2011	Diegnan Rosemarie	view file		Validate	view log	5	

Import Roster File

Home Send eDocs Preferences Directory

EDOCS PROFILE MANAGE ADMINISTRATORS MANAGE SEND PREFERENCES IMPORT STUDENT RECORDS

Select Preferences

To edit your school information, select the appropriate preference below.

Profile	Address, contact, and other information about your organization
Manage Administrators	Profiles and access privileges for Docufide Sender administrators
Manage Sender Preferences	Set options for sending transcripts and other admission documents
eDocs	Options for Naviance eDocs
Import Student Records	Import Student Records.

Home Send eDocs Preferences Directory

EDOCS PROFILE MANAGE ADMINISTRATORS MANAGE SEND PREFERENCES IMPORT STUDENT RECORDS

Identify File > Map Fields > Review History/Log

Import Student Roster

The following fields must be included in your Student Roster file. To learn more about the data file requirements, [download the Student Roster Import Guide](#).

- Student Name (First and Last)
- Student Date of Birth
- Student ID (must be unique across all class years)
- Graduation/Leave Year
- Street Address
- City
- State
- Postal Code

Description of File:

* Data File:

File Type: ☒ Comma Delineated (CSV) ☐ Tab Delineated

File Include Headers: ☒ Yes ☐ No

Upload Mode: ☒ Import Mode ☐ Validation Mode

Step 5: Review Import History

The Import Log provides a full history of all roster imports including:

- Date imported
- Administrator that completed the import
- Link to the imported data file
- Optional description of the file
- Import mode (e.g. import or validation)
- Link to view the import log, including any errors
- Number of records included in the import

Step 1: Access Import Student Roster Page

Select the 'Preferences' link header bar and then the 'Import Roster Records' link.

Note: An administrator must have Site Admin permission for the Docufide Sender module to access the Import Roster Records page.

Step 2: Upload the Import File

Upload the import file. You can provide an optional description for the file to make it easier to identify the import on the History/Log page.

Other settings to note include:

- File Type – indicate whether the file is a CSV or Tab Delineated file.
- File Include Headers – indicate whether the first row of the file contains column headings or actual data that should be imported.
- Upload Mode – select 'Import Mode' to import the file without first validating it. If there are any errors in the file, Docufide will identify the errors and skip the record when completing the upload.

HomeSendeDocs

PreferencesDirectory

EDOCSPROFILEMANAGE ADMINISTRATORSMANAGE SEND PREFERENCESIMPORT STUDENT RECORDS

Identify File > Map Fields > Review History/Log

Import Student Roster

Map the fields in your data file to the available field to import.

☒ Save Mapping

Column	Your Data	Available Roster Fields
1	First Name	<input type="text" value="Student First Name (required)"/>
2	Last Name	<input type="text" value="Student Last Name (required)"/>
3	DOB	<input type="text" value="Date of Birth (required)"/>
4	Student ID	<input type="text" value="Student ID (required)"/>
5	Grad year	<input type="text" value="Graduation/Leave Year (required)"/>
6	Gender	<input type="text" value="Gender"/>
7	Address	<input type="text" value="Address1 (required)"/>
8	City	<input type="text" value="City (required)"/>
9	State	<input type="text" value="State (required)"/>
10	Postal Code	<input type="text" value="Postal Code (required)"/>

Continue

HomeSendeDocs

PreferencesDirectory

EDOCSPROFILEMANAGE ADMINISTRATORSMANAGE SEND PREFERENCESIMPORT STUDENT RECORDS

Identify File > Map Fields > Review History/Log

Import Student Roster

Import History/Log

Date	Admin	Data File	Description	Import Mode	Log	Records	
10/16/2011	Diegnan Rosemarie	view file	2011/2012 Grades 9-12	Import	view log	5	undo
10/16/2011	Diegnan Rosemarie	view file		Validate	view log	5	

Step 3: Map Fields

Map the fields in your file to the fields in the Docufide database. Docufide will attempt to automatically map the fields, but you can correct the mapping as needed.

If you select the ‘Save Mapping’ checkbox, the next time you import a file the system will ‘remember’ the field mapping.

Step 4: Review Import History

The Import Log provides a full history of all roster imports including:

- Date imported
- Administrator that completed the import
- Link to the imported data file
- Optional description of the file
- Import mode (e.g. import or validation)
- Link to view the import log, including any errors
- Number of records included in the import

Undo Roster Import

The 'Undo Import' function allows you to immediately undo an import if you uploaded an incorrect file. You will not be able to undo an import once at least once student included in the file has successfully registered with Parchment.

Home

Send

eDocs

Preferences

Directory

EDOCS

PROFILE

MANAGE ADMINISTRATORS

MANAGE SEND PREFERENCES

IMPORT STUDENT RECORDS

Identify File > Map Fields > Review History/Log

Import Student Roster

Import History/Log

Date	Admin	Data File	Description	Import Mode	Log	Records	
10/16/2011	Diegnan Rosemarie	view file	2011/2012 Grades 9-12	Import	view log	5	undo
10/16/2011	Diegnan Rosemarie	view file		Validate	view log	5	

Home	Send	eDocs	Preferences	Directory
EDOCS	PROFILE	MANAGE ADMINISTRATORS	MANAGE SEND PREFERENCES	IMPORT STUDENT RECORDS
Undo Student Record Import				
You are about to permanently remove data from Docufide by Parchment! You cannot undo this operation.				
Description of File: 2011/2012 Grades 9-12 Date File Imported: 10/16/2011 Imported By: Rosemarie Diegnan Number of Records: 5				
<input type="button" value="Continue"/> <input type="button" value="Cancel"/>				

Step 1: Review Import History

On the Import History/Log page, select the 'undo' link for the import you want to delete.

Step 2: Confirm Undo

On the 'Undo Student Record Import' page, click the Continue to undo the import. You cannot reverse the operation once you click Continue.

If you do not want to cancel the undo, click the Cancel button.

Manage Student Registrations

Once you have imported your student roster, you can manage student registrations through the Manage Student page. From this page you can complete the following functions:

- Review student registrations to determine which students have not yet registered with Parchment.
- Add individual student roster records if a student enrolls after the import was completed.
- Edit student roster records.

Review Student Registrations

Manage Students
Edit your options for sending transcripts and other admission documents.

Manage Roster **Add Students**

Search Filters:

- Graduation/Leave Year:
- Last Name:
- First Name:
- Enrollment Status:
 - ☒ All Enrolled Statuses
 - ☐ Current Students Only
 - ☐ Former Students Only
- Hold List:
 - ☐ All Hold Statuses
 - ☐ Students 'On Hold' only
 - ☐ Student not 'On Hold' only
- Registration Status:
 - ☒ All Registration Statuses
 - ☐ Students registered with Parchment only
 - ☐ Students not registered with Parchment only

3 records match your selected search criteria.

<input type="checkbox"/>	Student Name	Date of Birth	Gender	Student ID	Graduation/Leave Year	Transcript
<input type="checkbox"/>	Johnson, Shyanne	07/20/0014	Female	00101647	2015	view transaction history
<input type="checkbox"/>	Johnson, Cassie PIN: erULBFhDXa	07/20/0013	Female	00101663	2015	
<input type="checkbox"/>	Johnson, Sabrina PIN: FVN4KnQ383	04/17/0017	Female	00101512	2014	

Step 1: Locate Student Records

To view the student roster records and registrations, select the 'Send' tab in the header and 'Manage Students' link in the sub-header.

Note: An administrator must have Sender permissions to access the Manage Students page.

Step 2: Search for Student Records

Select the search criteria to locate your student records and click 'Search' to return a list of student records matching your criteria.

Notes:

- If a student has registers with Parchment using their Parchment Registration Code, the code will no longer be displayed in the roster. Instead, a 'pin' icon will display indicating that the student registered using their registration code.
- If a student has not yet registered, or did not register suing their Parchment Registration Code, the code will display in the roster. To facilitate registrations, an administrator can use this page to lookup a registration code and provide it to a student after verifying their identity (preferably by requiring the student to show a picture ID).

Add Student Record

Because students may enroll midterm, you can manually enter student records at any time on the Manage Students page. When a record is manually entered, the system auto-generates a registration code for the student, but Parchment does not send a registration letter to the student. You will need to provide the registration code directly to the student.

Home Send eDocs Preferences Directory

TRANSCRIPT REQUESTS (11) DOCUMENT REQUESTS (14) **MANAGE STUDENTS** WEB UPLOAD REPORT REQUEST

Manage Students: Add Student

Manage Roster **Add Students**

Student Information

* First Name: Gender:

Middle Name: * Date of Birth:

* Last Name: * Unique Student ID:

Suffix: * Graduation/Leave Year:

PIN: Current Grade Level:

Or highest level completed

Contact Information

* Country: Phone Number:

* Address: Email Address:

* City:

* State/Province:

* Postal Code:

Parent/Guardian Information [add parent/guardian](#)

Add

Step 1: Add Student Record

On the Manage Students page, click the 'Add Student' tab.

Complete at least the required fields to add the student record.

Note: The Student ID entered on this page must be a unique ID that allows you to update the record through the import.

Manage PIN Settings

On the PIN Settings page you can:

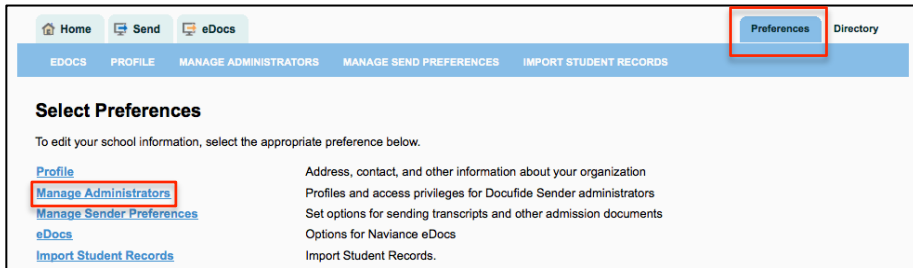
- Generate a mail merge file or PDF with the Parchment Registrations Codes.
- Upload a logo to be included on the registration letter sent by Parchment.

Note: An administrator must have Site Admin permissions for Docufide Sender to access the Manage PIN Settings page.

Generate Mail Merge File or PDF of Parchment Registration Codes

To assist with distributing Parchment Registration Codes (or PINs), you can generate two types of files:

- Generate a mail merge file to print and mail the registration codes to your students.
- Print a PDF version of the registration codes to distribute the codes in person (such as during a back to school event or during home room).



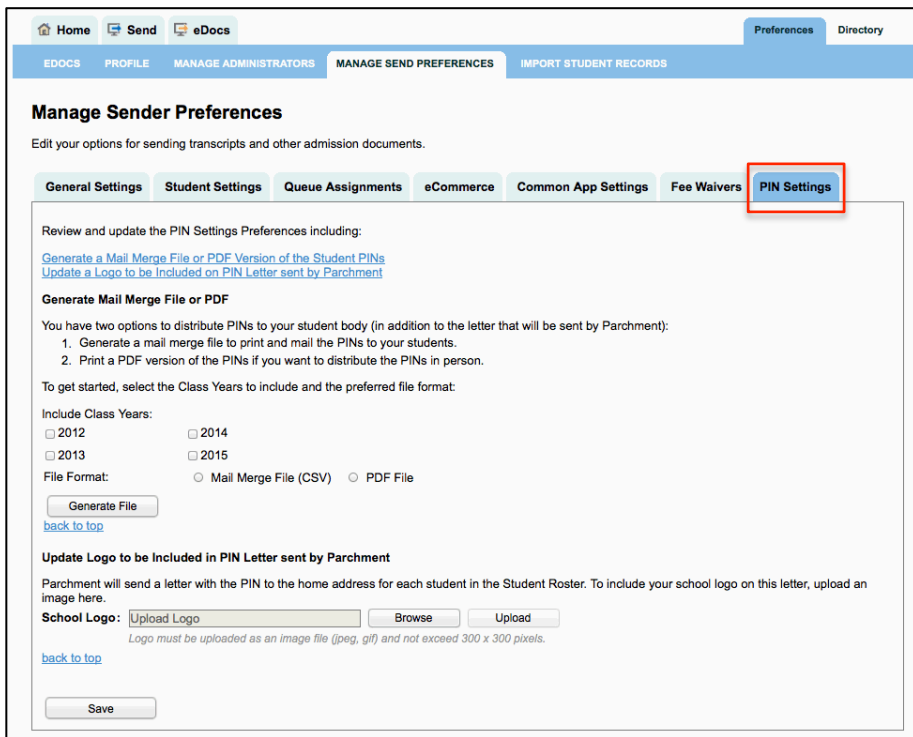
Home Send eDocs Preferences Directory

EDOCS PROFILE MANAGE ADMINISTRATORS MANAGE SEND PREFERENCES IMPORT STUDENT RECORDS

Select Preferences

To edit your school information, select the appropriate preference below.

Profile	Address, contact, and other information about your organization
Manage Administrators	Profiles and access privileges for Docufide Sender administrators
Manage Sender Preferences	Set options for sending transcripts and other admission documents
eDocs	Options for Naviance eDocs
Import Student Records	Import Student Records.



Home Send eDocs Preferences Directory

EDOCS PROFILE MANAGE ADMINISTRATORS MANAGE SEND PREFERENCES IMPORT STUDENT RECORDS

Manage Sender Preferences

Edit your options for sending transcripts and other admission documents.

General Settings Student Settings Queue Assignments eCommerce Common App Settings Fee Waivers **PIN Settings**

Review and update the PIN Settings Preferences including:

- [Generate a Mail Merge File or PDF Version of the Student PINs](#)
- [Update a Logo to be Included on PIN Letter sent by Parchment](#)

Generate Mail Merge File or PDF

You have two options to distribute PINs to your student body (in addition to the letter that will be sent by Parchment):

1. Generate a mail merge file to print and mail the PINs to your students.
2. Print a PDF version of the PINs if you want to distribute the PINs in person.

To get started, select the Class Years to include and the preferred file format:

Include Class Years:

☐ 2012 ☐ 2014
☐ 2013 ☐ 2015

File Format: ☐ Mail Merge File (CSV) ☐ PDF File

[back to top](#)

Update Logo to be Included in PIN Letter sent by Parchment

Parchment will send a letter with the PIN to the home address for each student in the Student Roster. To include your school logo on this letter, upload an image here.

School Logo:

Logo must be uploaded as an image file (jpeg, gif) and not exceed 300 x 300 pixels.

[back to top](#)

Step 1: Access PIN Settings Page

Select the 'Preferences' link header bar and then the 'Mange Sender Preferences' link.

On the Mange Sender Preferences page select the 'PIN Settings' tab.

Step 2: Generate a Mail Merge File or PDF

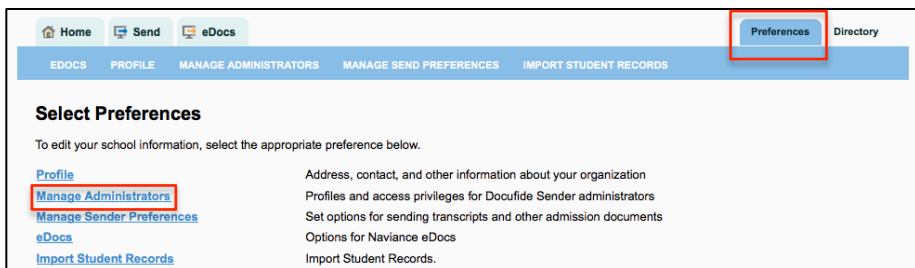
Select the class years you want to include in the file. The available class years include the current student body only because registration codes are generated for current students only.

Select the File Format:

- Mail Merge File – generates a CSV file that can be used to create a mail merge document in Word.
- PDF File – PDF of all registration codes that can be printed.

Upload Logo for Registration Letter

Parchment sends a registration letter to all current students providing instructions to register with the Parchment, and includes the student's unique Parchment Registration Code. Because this letter is sent by Parchment on behalf of your school, Parchment encourages you to upload a logo that can be included on the letter.



Home Send eDocs Preferences Directory

EDOCS PROFILE MANAGE ADMINISTRATORS MANAGE SEND PREFERENCES IMPORT STUDENT RECORDS

Select Preferences

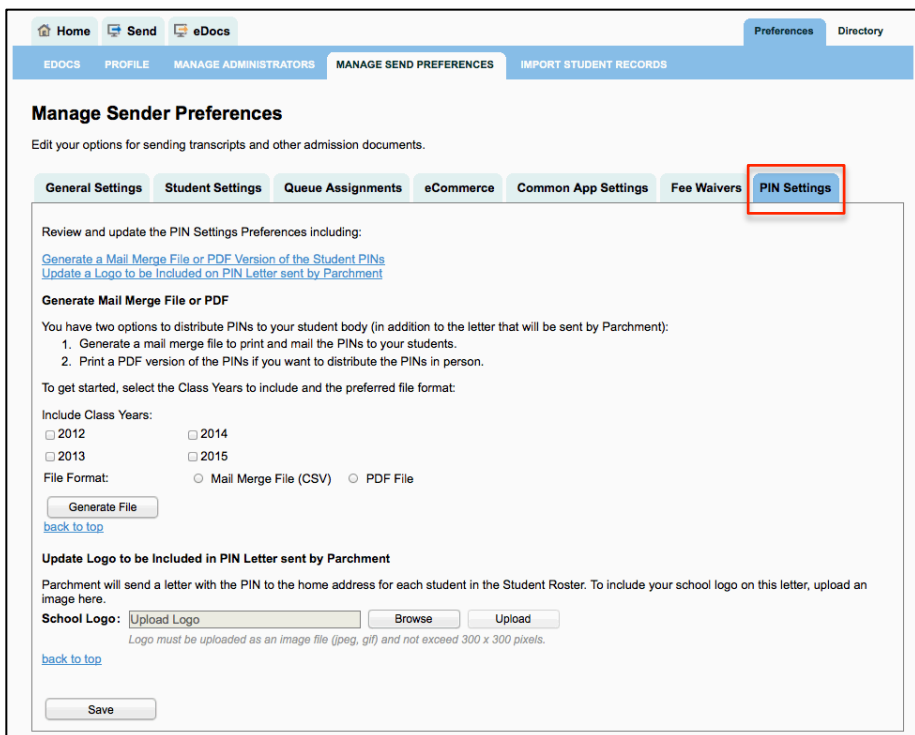
To edit your school information, select the appropriate preference below.

Profile	Address, contact, and other information about your organization
Manage Administrators	Profiles and access privileges for Docufide Sender administrators
Manage Sender Preferences	Set options for sending transcripts and other admission documents
eDocs	Options for Naviance eDocs
Import Student Records	Import Student Records.

Step 1: Access PIN Settings Page

Select the 'Preferences' link header bar and then the 'Mange Sender Preferences' link.

On the Mange Sender Preferences page select the 'PIN Settings' tab.



Home Send eDocs Preferences Directory

EDOCS PROFILE MANAGE ADMINISTRATORS MANAGE SEND PREFERENCES IMPORT STUDENT RECORDS

Manage Sender Preferences

Edit your options for sending transcripts and other admission documents.

General Settings Student Settings Queue Assignments eCommerce Common App Settings Fee Waivers **PIN Settings**

Review and update the PIN Settings Preferences including:

- [Generate a Mail Merge File or PDF Version of the Student PINs](#)
- [Update a Logo to be Included on PIN Letter sent by Parchment](#)

Generate Mail Merge File or PDF

You have two options to distribute PINs to your student body (in addition to the letter that will be sent by Parchment):

1. Generate a mail merge file to print and mail the PINs to your students.
2. Print a PDF version of the PINs if you want to distribute the PINs in person.

To get started, select the Class Years to include and the preferred file format:

Include Class Years:

☐ 2012 ☐ 2014
☐ 2013 ☐ 2015

File Format: ☐ Mail Merge File (CSV) ☐ PDF File

[back to top](#)

Update Logo to be Included in PIN Letter sent by Parchment

Parchment will send a letter with the PIN to the home address for each student in the Student Roster. To include your school logo on this letter, upload an image here.

School Logo:

Logo must be uploaded as an image file (jpeg, gif) and not exceed 300 x 300 pixels.

[back to top](#)

Step 2: Upload Logo

Click the 'Browse' button to locate the logo file, and then click Upload to upload the file.

Note: Logo files must be:

- Maximum width of 300 pixels.
- GIF or JPEG format.
- Sufficient resolution and quality for printing.